



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title
Deputy Director

Job Code Title
Operations Manager IV

Pay Band
9a

Job Code Number
111219

Director's Office
Executive Office

Fair Labor Standards Act
Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Director's Office supports the agency's Director and is composed of four work units: Legal Services Office; Office of Tax Policy and Research; Office of Human Resources and Organizational Development; and the Executive Office. The Executive Office includes the administrative support staff, fiscal administrator, public relations, and taxpayer assistance and public outreach.

Job Responsibilities

The Deputy Director plans, directs, or coordinates overall departmental operations as the principle advisor to the director. Duties and responsibilities include formulating policies; managing daily operations; planning the use of materials and human resources; and planning, developing, and directing the goals and objectives of the department as a member of the executive leadership team. The incumbent assists the director in budgeting, administrative management, personnel management, communications, and in providing leadership. Acts on behalf of, and represents, the director at internal and external meetings. The position reports to the director and directly supervises the fiscal administrator and the communications officer. May supervise other Director's Office staff.

- **Departmental Administration 50%**

The incumbent is responsible for the daily operation of the department and provides overall policy direction and control for department operations. Assures overall department goals, objectives, and standards are accomplished. The deputy director has full authority to act as department director in the director's absence.

1. Establishes overall policy and operational direction and priorities. Provides management control of the department to ensure all goals, objectives, policies, and standards are accomplished. Conducts and directs program and management analyses. Implements necessary changes to assure achievement of department goals. Coordinates functions of the administrative staff. Establishes policy and procedure. Directs the day-to-day operation of the Director's Office.
2. Implements departmental priorities. Leads changes to organizational structures and work operations necessary to achieve the agency mission within the intent of all relevant statutes.

3. Advises the director on the organizational structure and inter-relationships of all department units. Establishes priorities and provides policy guidance and direction to all organizational units of the department to ensure achievement of department and program goals.
4. Researches and develops policy on major issues affecting operations and resources for all areas of the department.
5. Conducts analyses of organizational strategies. Directs implementation of appropriate organizational changes. Evaluates existing management systems and regarding improvements. Initiates required changes. Negotiates, approves, and initiates staffing changes using an understanding of federal and state laws, regulations, and policies of various agencies and private concerns.
6. Monitors the accomplishments of the organization and the status of all programs. Takes required action to ensure goals are met. Performs management reviews relative to pertinent issues department-wide and implements identified changes or improvements.
7. Assesses the effectiveness and efficiency of major programs; how the programs function between divisions; and the impact of any new developments in those programs. Assesses the effectiveness of inter-divisional coordination and cooperation within the department and negotiates or determines solutions when conflicts occur. Assesses how subsequent policies that are developed relate to other governmental entities and the private sector.
8. Works with the administrative staff members to identify service gaps and approves and/or directs the development of required services and programs.
9. Negotiates resolutions to differences or problems that occur between members of the administrative staff. As the liaison with other agencies and state's revenue departments, resolves issues that require negotiation or compromise. When resolutions cannot be negotiated, determines and directs the implementation of solutions to resolve the conflict or problem.
10. Provides a forum for negotiation of disputes between divisions or between the department and the general public. Determines the appropriate method for resolution of disputes. When they can't be resolved, determines a fair and equitable resolution for implementation by the director.
11. As the department's liaison with the legislature, provides legislative testimony when required. Reviews, analyzes, and formulates recommendations for legislation and federal administrative rule changes. Interprets department policies, positions, and programs for the media, local governments, legislators, and the Congressional Delegation. Represents the department's focus in meetings, negotiations with local governments, tribal governments, federal land management agencies, other state agencies, and private concerns.
12. Reviews budgets and relates requests to the accomplishment of agency objectives. Evaluates existing management systems and directs necessary improvements to accomplish agency objectives or federally mandated responsibilities. Assesses the impact of development and implementation of new management systems. Reviews department manpower requests and approves staffing levels needed to accomplish agency goals in the most economical manner.

- **Staff Management and Supervision 20%**

The incumbent manages division administrators directly to ensure the effective use of their work units in compliance with collective bargaining agreements and employment policy and law.

Management

1. Conducts strategic planning in coordination with the director and executive management team to develop and establish short, intermediate, and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.

2. Allocates human resources and FTE authority for all divisions, based on legislative intent, to achieve the most cost-effective and efficient organizational structure to carry out division objectives and the mission of the department. Reviews and approves all job descriptions. Determines the division's organizational structure by analyzing work structure, workload, and work output and making recommendations to the director.
3. Supervises division administrators and indirectly manages other programs by reviewing and revising overall division work plans, priorities, and procedures and monitoring progress through meetings and consultations. Directs the department's leadership team meetings, disseminates data, and promotes information exchange to support and advance division goals.
4. Establishes and approves overall responsibilities, organizational structures, work activities, priorities, and allocation of division administrators in response to federal and other funding mandates and programmatic needs. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to other organizational units.
5. Identifies staffing needs, recruits, and hires employees. Ensures compliance with state and federal employment and civil rights law throughout the hiring process, assigning personnel screening and selection committees, reviewing results, and making final determinations for hiring. Ensures proper training and orientation of new employees.
6. Develops and implements workforce development, staffing, succession planning, and professional development plans, policies, and systems. Ensures adequate staffing, expertise, and skills are available to meet current and future agency business needs and to provide employee development and advancement opportunities. Identifies and documents critical technical and behavioral competencies. Develops performance and competency management and evaluation tools and systems. Establishes advancement criteria. Creates and implements cross-training and professional development opportunities for staff and related staffing and employee development activities.

Staff Leadership and Supervision

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous goals and objectives of their division.
2. Readily adapts to changes in existing operations, programs, services, and functions. Makes recommendations or takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
3. Evaluates the performance of all division administrators and completes performance evaluations with the director. Reviews the work of positions indirectly supervised through assessment of performance evaluations prepared by subordinate staff. Implements and monitors corrective action including discipline and termination. Enforces discipline policies to ensure consistency in application of disciplinary action. Maintains records, prepares reports, and composes correspondence associated with performance evaluations.
4. Makes and accepts responsibility for decisions necessary to carry out mission of the Director's Office and the department.
5. Ensures that division administrators comply with bargaining agreements and state and departmental personnel rules, regulations, and policies. Resolves grievances at the lowest level when possible.
6. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

- **Professional and Policy Development 20%**

The incumbent represents the department and the state to organizations and conferences at a national level and ensures that the department implements new programs, policies, and strategies that will benefit the citizens of Montana.

1. Represents the State of Montana in the development of national tax policy, standards, and goals through active participation on committees and task forces of national and regional associations of state revenue and taxation officials.
2. Ensures that appropriate management training and developmental opportunities are provided in a manner consistent with current organizational management philosophy to maintain and further operational knowledge.
3. Reviews all relevant journals, books, and web or video-based materials relating to revenue or taxation to maintain the highest level of professional development within the department and determine which staff should review these materials.
4. Oversees the development of both written materials and oral presentations designed to brief newly-appointed directors on all aspects of agency operations and ongoing issues demanding policy decisions.
5. Makes public presentations and appearances before members of the media as appropriate to disseminate information on departmental activities and the public impacts thereof.

- **Other Duties as Assigned 10%**

1. Performs other duties as assigned by the director.

Job Requirements

To perform successfully as a deputy director, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that the incumbent has the abilities to advance program and agency goals; provide effective organizational leadership and direction; recognize, analyze, and solve complex management problems; deal effectively with highly sensitive public, political, and agency relations; discern interrelationships among diverse kinds of information; assess hypothetical situations and impacts; consolidate a unified strategy in response to numerous issues and concerns; and make proper decisions in stressful situations.

Skills in oral and written communication and in establishing and maintaining effective working relationships with others, both inside and outside the agency are required. The incumbent is required to establish and maintain effective working relationships both inside and outside the agency including the public, officials, and agency employees. The position requires considerable skill in developing approaches to issues that have significant economic impacts on the state and taxpayers; program planning and implementation; negotiation, facilitation, and mediation; leadership techniques; management practices; project management; resource planning; organizational design; staffing and resource allocation; program administration; and budgeting. It is essential that the incumbent has the ability to work cross-functionally with all levels of senior management and employees and work effectively under pressure. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of tax policy and revenue collection procedures and activities; organizational relationships and functions of the department; the basic structure and relationships of organizational units in Montana government; and the law, rules, and regulations governing department expenditures and programs. The work requires extensive knowledge of management practices and procedures; public relations; principles and practices of personnel management; extensive knowledge of the legislative process; budgeting and fiscal management practices; applied research principles; development and implementation of broad policies based on short and long-term planning; and management concepts and practices including strategic management. Knowledge of computers and database management including state and information systems (GenTax, TAP, ORION, SABHRS); data collection, analysis, and reporting techniques; compliance requirements and practices; customer service standards; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law are also required.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a master's degree in economics, public administration, public policy, or a closely related field and eight years of job-related work experience.
 - Work experience should include increasingly responsible administration, analysis, and management within the area of general government, especially tax and revenue projects.
 - Experience with legislative operations and/or reporting to an elected or appointed official, public board, or similar agency within the public sector preferred. Extensive experience within the administrative structure of the department preferred.
 - Other combinations of education and experience will be evaluated on an individual basis. Persons from differing backgrounds may have the competencies to excel in this position. The specific experience needed at any given point in time is at the discretion of the director at the time of hire.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of the department and the department and director's office functions. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours routinely exceed 40 hours per week, which may include working evenings and weekends, especially leading up to and during legislative sessions. May involve minimal travel some of which is out of state therefore a valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Dan Bucks, Director Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____

Date: _____

Name (print): _____